

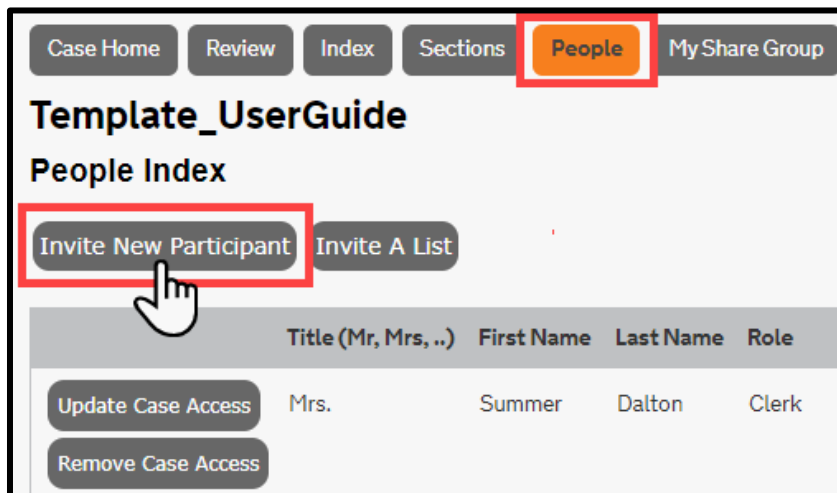
Digital Evidence

Invite a New Participant

Parties, Attorneys, Law Office Staff, and Court/Clerk Staff will only have access to cases that they have been invited into. Only user roles that have been granted access permission to Invite People will be able to invite additional people into a case.

1. Log in to portal > Locate Case > Select **Update Case** > Select **People tab**

Note: when cases are created using a template, upon creation of a case, all users included in the template will be automatically invited and have access to the case and placeholder bundles/sections



- a. Select the **Invite New Participant** button to add a person to the case
- b. Select the **Invite A List** button to invite a group of people into a case
 - i. To use this function, an Invite List must exist
 - ii. If there is a need to create an Invite List, view the **How to Create an Invite List** document available at: <https://www.azcourts.gov/digitalevidence/Training/Attorney-and-Self-Represented-Litigants>
- c. A person or an Invite List must be added to the case **one at a time**, and the process must be repeated when adding multiple people and/or lists (*three screenshots below*)

Case Home Review Index Sections **People** My Share Group Bundles

Template_UserGuide

Invite A New Case Participant



Person's Email

Role




- ☐ Appellate
- ☐ Attorney
- ☐ Clerk
- ☐ Interested Party
- ☐ Judicial Administrative Staff/Court Staff
- ☐ Judicial Officer
- ☐ Juror
- ☐ Law Office Staff
- ☐ Litigant
- ☐ Public Access Request
- ☐ Self Represented Litigant
- ☐ System Support

Pre-Register ☐











- i. **Person's Email:** enter the person's **email address**
 - A. When using the **Invite A List** button, this field will appear as 'Invite List' along with a **dropdown menu** for the user to choose an existing list, and the fields for role and pre-register will not appear on the screen, [skip to step iv](#)
- ii. **Role:** when a person has not registered, select the **appropriate role** for the user
 - A. Separate roles are available for Attorney and Law Office Staff
 - B. If the person already registered a user account, then the Role will be automatically selected
- iii. **Pre-Register:** **leave unchecked** – this field only appears when a person has not registered

Expiry Date  

Bundle Access

01: Master Bundle	<input type="checkbox"/>	
02: Hearing Type	<input checked="" type="checkbox"/>	
03: PLACEHOLDERHearing2	<input type="checkbox"/>	

Access Permissions

Change This Case	<input type="checkbox"/>	
Add/Remove Party Documents	<input type="checkbox"/>	
Download Documents	<input type="checkbox"/>	
View Documents	<input type="checkbox"/>	
Add Notes	<input type="checkbox"/>	
Add Hyperlinks	<input type="checkbox"/>	
Invite People	<input type="checkbox"/>	
Update People's Access	<input type="checkbox"/>	
Make Redactions	<input type="checkbox"/>	
View Redaction Sub-categories	<input type="checkbox"/>	

- iv. **Expiry Date:** **leave blank**, or to provide limited-time access, select the calendar icon to choose the date that the user's access to the case will expire
- v. **Bundle Access:** **select the box related to the appropriate Hearing Bundle** to add a check mark
 - A. The user adding a person/list to a case will only be able to provide access to bundles that they have been given access to
 - B. **For Court/Clerk Users:**
 - 1. **Master Bundle access should ONLY be provided to clerk/court users**
 - 2. DO NOT provide parties/attorneys with access to Placeholder Hearing Bundles
- vi. **Access Permissions:** will be **automatically selected based on the user's Role**
 - A. Auto-selected permissions can be removed, if needed
 - B. Additional permissions may be selected, but the user adding a person/list to a case will only be able to provide access permissions which they have been granted
 - C. **For Court/Clerk Users:** **"Change This Case" and "Update People's Access" should ONLY be provided to CLERK/COURT Users**

Emails

Send bundle update notifications by Email ☐ ?

Send Advisory Invitation Email ☒ ?

Invitation Message

Enter Message

Invite

vii. **Emails:**

- A. **Send bundle update notifications by Email: Do NOT select**
 - B. **Send Advisory Invitation Email: Select** to send an email notification to the invited user
 1. In the **textbox**, **provide guidance on the court's policy**, for example: *Please upload all of your evidence at least 2 days prior to the hearing/trial*
 - a. If the text box is not visible, **deselect and reselect the box** to remove/re-add the check mark
 2. If the invited user has opted-out of receiving invitation emails, a **message will appear** indicating that the user opted to not receive advisory emails, which cannot be overridden
- viii. Select the **Invite button** to complete the invitation process
- d. **Repeat** this process until all appropriate people/lists have been invited to the case